



AUDIENCE
An Introduction

Kari Ross Nelson | Independent Evaluator
Mindy Wilson | Utah Museum of Fine Arts
March 28, 2019 | Salt Lake City, UT

WELCOME, INTRODUCTIONS
& PROGRAM OVERVIEW



AUD Module Instructors



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Agenda Overview



SCHEDULE

Morning

- Welcome & Introductions
- AUD Module Overview
- Why This Is Important
- Understanding Your Visitors

Afternoon

- Marketing Basics
- Visitor Studies Basics
- Evaluation Basics
- Wrap-Up & Assignments
- Mentor Group Break-outs

GOALS FOR TODAY

Ways of understanding and connecting with your audience

- How to collect visitor information and locate demographic research and overall trends
- How to use that information to make your organization more relevant to your visitors and communities
- Key marketing concepts and strategies for promoting your museum
- Clarity on organizational next steps in this topic area

GROUND RULES



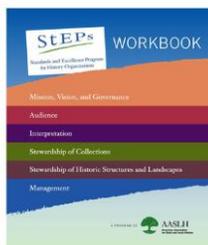
- Responsible for your own learning
- Respect confidentiality
- Honor time limits
- Cell phones – be cool
- Typos are okay

AUDIENCE MODULE OVERVIEW

Introduction to Audience (AUD)

This module covers:

- Marketing & public relations
- Audience & visitor research
- Community relations
- Visitor services



Refer to page 77 of your STEPs Workbook

Survey Says



A survey of Utah museums in February 2018 elicited these topic priorities for this module.

- 1) Audience and visitor research (identifying current and potential audiences and decisions on how to serve them)
- 2) Marketing and PR (regularly promotes institution and thinks strategically on how it shares information) *[tied for 2nd place in survey]*
- 3) Community relations (thinks about how to provide public physical and intellectual access to the institution and its resources) *[tied for 2nd place in survey]*
- 4) Visitor services (providing high level of basic visitor services)

AUD Module Schedule



March 25, 2019
Full-day Workshop | Audience: An Introduction

April 29, 2019
Half-day Skills Lab | Building a Marketing Plan

May 2019 (date to be negotiated with Mentor)
Mentor Site Visits | Work on Your Individual Projects

June 24, 2019
Full-Day Workshop | Building Relationships
(community relations, new audiences, guest services, visitor experiences, etc.)

Defining Terms

Who are your...	What is...
<ul style="list-style-type: none"> ▪ Audience? ▪ Visitors? ▪ Community? ▪ Relationships? 	<ul style="list-style-type: none"> ▪ Visitor Studies? ▪ Audience Evaluation? ▪ Program Evaluation? ▪ Marketing?



AUD Standard 1

The institution identifies current and potential audiences it serves, and makes appropriate decisions in how it serves them.

A. Does the institution actively collect information about current and potential visitors?

B. Does the institution regularly evaluate its activities?

AUD Standard 2

Regardless of its self-identified communities, the institution strives to be a good neighbor in its geographic area.

- A. Does the institution know its neighbors?*
- B. Does the institution respond to demographic, economic, social, & political changes in the community & region?*
- C. Does the institution work with other groups in the community?*
- D. Does the institution allocate resources to serve the community and enhance quality of life?*

AUD Standard 3

The institution demonstrates a commitment to providing the public with physical and intellectual access to the institution and its resources.

- A. Does the institution regularly offer the public a variety of opportunities for physical and intellectual access (e.g., tours, events, programs, publications, website)?*
- B. Does the institution actively promote its activities and resources to the public?*

AUD Standard 4

The institution regularly promotes the institution and its activities and thinks strategically about how it shares information.

- A. Does the institution regularly promote its activities through a variety of methods (e.g., newsletter, press release, website, brochure, media)?*
- B. Do the institution's promotional materials communicate a consistent institutional identity?*
- C. Is there a written plan for promoting the institution?*

AUD Standard 5

The institution is committed to providing a high level of basic visitor services and makes continued improvements in the delivery of those services.

- A. Can visitors easily navigate to and around the institution?
- B. Are basic amenities such as restrooms, water, and seating available to visitors?
- C. Do paid and unpaid staff receive customer service and hospitality training?
- D. Does the institution meet the needs of visitors with physical and mental disabilities?

AUD Unacceptable Practices

Unacceptable practices that are unethical and in some cases illegal:

- Avoidance of, or resistance to, participation in museum activities by any person based on race, ethnicity, social status, gender, ability, or sexual orientation.
- Prejudicial interpretation of visitor assessments.

What THIS Workshop Covers

- Importance of Connecting to Visitors
- Understanding Your Visitors
- Marketing Basics
- Visitor Studies Basics
- Evaluation Basics



WHY CONNECTING TO AUDIENCE MATTERS

OF/BY/FOR ALL | Video



NINA SIMON

Executive Director, Santa Cruz Museum of Art & History

- ✓ Author, *The Participatory Museum* (2010)
- ✓ Author, *The Art of Relevance* (2016)
- ✓ Blogger, Museum 2.0, museumtwo.blogspot.com
- ✓ @ninaksimom
- ✓ #ofbyforall



OF/BY/FOR ALL Framework

Video Introduction [37 mins]

Museum Next Conference, London, 2018

OF/BY/FOR ALL | Discussion



- 1) What do you think?
- 2) What are Simon's primary messages?
- 3) How can your organization become of by and for your community?
- 4) What are YOU willing to change to get new people to your museum?

Free self-assessment at
<https://www.ofbyforall.org/assess-now>

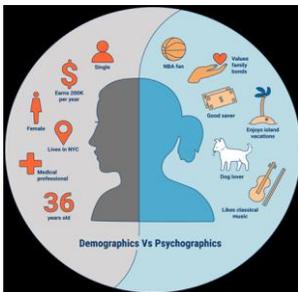
MORNING BREAK – 15 minutes



UNDERSTANDING YOUR VISITORS

Ways of Thinking About Your Visitors

What do you know about your visitors & how do you know it?



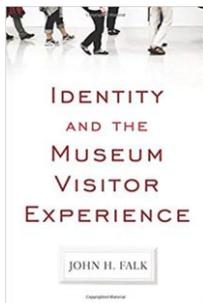
Demographics

- Age
- Gender
- Race
- Marital status
- Children #
- Occupation
- Annual income
- Education level

Psychographics

- Motivations
- Attitudes
- Behaviors

Falk's Visitor Identities



- 1) Explorers
- 2) Facilitators
- 3) Experience Seekers
- 4) Professionals/Hobbyists
- 5) Rechargers



Explorers

Want to learn new information & understand new concepts



Facilitators

Want to ensure that their companions meet their visit goals

Experience Seekers

Want to see the most renowned pieces & make memories



Professionals / Hobbyists

Want to see & study
specific pieces
or exhibits



Rechargers

Want to relax in a peaceful atmosphere



HANDS-ON ACTIVITY #1

IDENTITY RELATED MOTIVATIONS

IDENTITY RELATED MOTIVATIONS
HANDS-ON ACTIVITY #1 - 25 minutes

OBJECTIVES:

1. Identify the different types of identity related motivations.
2. Read the museum visitor interview transcript and determine which identity the interviewee represents. Underline parts of the text that tell you that. (10 minutes)
3. Briefly share with the larger group who your visitor is and a few key parts of the interview that help you understand his or her identity. (10 minutes)

Later on your own, think about:

- ✓ In what ways do you think your museum serves these identities well?
- ✓ How do your mission and strategic plans reflect/recognize these different types?

- 1) Break into SIX small groups (pairs or trios – museum teams split up if possible).
- 2) Read the museum visitor interview provided. Determine which identity the interviewee represents. Underline parts of the text that tell you that. (10 minutes)
- 3) Briefly share with the larger group who your visitor is and a few key parts of the interview that help you understand his or her identity. (10 minutes)

LUNCH BREAK – 60 minutes



MARKETING: MAKING THE CONNECTION

Marketing Basics



- What Is Marketing?
- Why Does It Matter?
- Identifying Your Audience
- Telling Your Story

What Is Marketing?

MARKETING = connecting **your mission** with **your visitors' wants and needs**

- Communicating effectively
 - **selling**
 - **persuading**
- Building mutually beneficial relationships



Why Does It Matter?

- Encourages attendance
- Generates income and supports fundraising
- Raises awareness
- Promotes status, brand, and reputation
- Supports and builds relationships
- Generates positive word of mouth



Effective Marketing Involves

Looking Inward – Internal Awareness & Alignment

- Help everyone in the museum understand their role in maintaining positive relations with public and stakeholders



Effective Marketing Involves



Looking Outward – Market & Audience Awareness & Alignment

- Be aware of the marketplace and your competition
- Ask visitors what they want and then “deliver the experience”
- Build relationships with other museums, organizations, schools, and universities
- Build relationships with the media
- Communicate regularly and consistently so that messages stick
- Be open to ideas, inspiration, creativity — good ideas come from everyone — and allow for mistakes

5Ps—Elements of the Marketing Mix



From Kotler, Museum Marketing & Strategy, 2nd ed. Jossey Bass 2008 p.29

New Marketing Funnel



Source: <https://blog.aweber.com/email-marketing/understanding-the-marketing-funnel-5-strategies-to-improve-your-email-marketing.htm>

What Should You Promote?

Specific exhibitions and programs?



Institution's value as a whole?



Promoting Exhibitions and Programs

- Gets "butts in seats"
- Easier to measure
- Limited potential for growing new audiences



Promoting the Institution

- Not easy to measure
- Sustained effort & longer timeline to see results
- Can have considerably broader impact

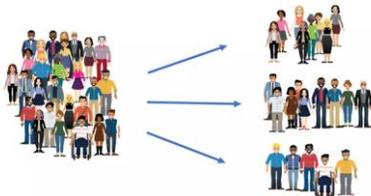


Identifying Your Audience

- **Who's coming to your museum (and who isn't)?**
 - Visitor log, Staff insight, Surveys
- **How well does your audience represent your community?**
 - University of Utah's Kem C. Gardner Policy Institute has census and own data about demographics of Utah.
 - <https://gardner.utah.edu/demographics/>
- **Who else might come?**
 - Those who "almost come" vs. those "who will never come"
 - Who lives and works nearby?
 - Who visits your website & follows you on social media?
 - Identify affinity groups.
 - Identify lookalikes.

Segmenting Your Audience

- Values and beliefs
- Cultural participation
- Leisure activity
- Media habits



Telling Your Story

Do you have a clear, consistent, and compelling message about:

- ❑ what you have
- ❑ who you are
- ❑ what you offer



What Is Your Brand Identity?

Brand = Institutional Identity

- Your museum’s public face
- The images, words, and feelings you want people to think of when they think of your museum

Why Does It Matter?

- Creates / heightens visibility (awareness)
- Creates / heightens attention (mind share)
- Develops loyalty



Effective Brand Messaging

- Demonstrates the museum’s unique value
- Is distinct from competitors
- Is recognizable and consistent
- Promotes trust, reliability, and quality
- Is positively internalized in the minds of visitors



Creating a Brand Message

Questions to Ask

- What does your museum do?
- What do you do better than or more uniquely than any other museum or cultural institution in your community?
- Why should someone visit your museum?
- What kinds of experiences can they expect to have?



HANDS-ON ACTIVITY #2

BRAND STATEMENT: ORGANIZATION ANALYSIS

STEP 1: HANDS-ON ACTIVITY #2
BRAND STATEMENT: ORGANIZATION ANALYSIS
 15-20 minutes

OBJECTIVES:

1. Identify the organization's mission and vision.
2. Analyze the organization's current brand identity and messaging.
3. Develop a brand statement that reflects the organization's mission and vision.
4. Create a brand identity that reflects the organization's mission and vision.

Organization Analysis

1. Why/What's your mission? (What does it do?)

2. Why/What's your vision? (What do you want?)

3. Why is your mission important?

4. Can another museum do what your museum does better, and if so, why/what's better about it?

- 1) Divide into pairs with someone on your museum team.
- 2) Answer the first **seven** questions on your sheet as they relate to your museum. Note any disagreements or areas of uncertainty (15 minutes).
- 3) Reconvene as large group to share out answers (15 minutes).
- 4) Focus on identifying what resonates (and doesn't) with:
 - ✓ members of museum teams
 - ✓ other STEPs participants

AFTERNOON BREAK – 15 minutes



IN LIEU OF MINDREADING: VISITOR STUDIES & EVALUATION



If we could read minds, we would know exactly what exhibits to show next year, what programs should accompany them, and how much text on a label is too much, too little, or just right. We could know what hours to be open so that the most people would come. We would understand what topics appeal to teenagers, moms with young children, fathers who work the swing shift, and visitors from out of town.

Unfortunately, we cannot read minds. We can best determine the contents of the hearts and minds of those people who choose to visit us — and, if we make the effort to find them, those who do not — by conducting visitor studies and evaluations.

If we ask our visitors what they think about what we do, and sometimes if we watch them use our museum, we can find some clues that will help us make good choices about exhibit topics, program formats, museum hours, and more.

- The Small Museum Toolkit, Book 4, Reaching and Responding to the Audience

Visitor Studies

- Interdisciplinary study of human experiences within informal learning environments.
- Systematic collection and analysis of information to inform decisions about interpretive exhibits and programs.
- Follows rigorous research methods that adhere to social sciences standards.
- Designed to improve the practices of learning in informal environments.



Source: <https://www.visitorstudies.org/glossary-of-terms>

Visitor Studies | A Case Study

HANDOUT | Klingler & Graft, "In Lieu of Mind Reading: Visitor Studies & Evaluation," *The Small Museum Toolkit: Book 4, Reaching and Responding to the Audience*, 2012.



- 1) What questions did they want to answer?
- 2) How did they collect the information?
- 3) How did they organize the information?
- 4) How did they use the information to make decisions?

*How can you see this being applied in your museum?
Do you have similar questions?*

Evaluation

Judging merit or worth of a program or exhibit through systematic collection of information about it.

- Requires **planning** to determine purpose of evaluation, type of information needed, who has that information, how it should be gathered, and the resources available to do it.
- **Quantitative** (butts in seats) vs. **Qualitative** (learning outcomes or impact)
- What is evaluated should be tied to **project goals and objectives**.
- Not just "summative" – done at every stage to inform the process.

Timeline	Project generation	Project proposal	Reviewed and approved	Planning phase	Development phase	Building/formalizing	Just run on the floor	Identification	Finalized
What questions do you want to answer?	How do you want to present it?	What do you want to present it?	What do you want to present it?	What do you want to present it?	What do you want to present it?	What do you want to present it?	What do you want to present it?	What do you want to present it?	What do you want to present it?
What do you want to present it?	What do you want to present it?	What do you want to present it?	What do you want to present it?	What do you want to present it?	What do you want to present it?	What do you want to present it?	What do you want to present it?	What do you want to present it?	What do you want to present it?

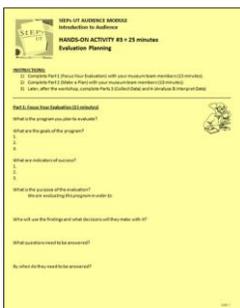
Source: <https://www.visitorstudies.org/glossary-of-terms>

STAGES OF EVALUATION

Project Proposal Planning Phase	Front-end Evaluation <ul style="list-style-type: none"> • Would people be interested in this? • What do people know about the topic? • What misconceptions do people have? • What do people want to know? • Is it on mission?
Development & Testing	Formative Evaluation <ul style="list-style-type: none"> • What is working for the users/visitors • What is not working and needs to be improved? • Do visitors get what the project is presenting? • Do visitors like the presentation? • How do visitors use/not use the project?
Finalized	Summative Evaluation <ul style="list-style-type: none"> • How well do people understand the main ideas of the project? • What elements worked well? Not as well? • Did it support our mission? • Did it reach the audience we had hoped it would?

HANDS-ON ACTIVITY #3

EVALUATION PLANNING



- 1) Complete Part 1 (Focus Your Evaluation) with your museum team members (15 minutes).
- 2) Complete Part 2 (Make a Plan) with your museum team members (10 minutes).
- 3) Later, after the workshop, complete Parts 3 (Collect Data) and 4 (Analyze & Interpret Data)

Evaluation Focus & Planning

What is Your Focus?

- Program goals
 - ✓ SMART goals
- What success looks like
- Purpose of the evaluation
- Questions to be answered



Planning Nuts & Bolts

- What?
- Who?
- How?
- Where?
- When?

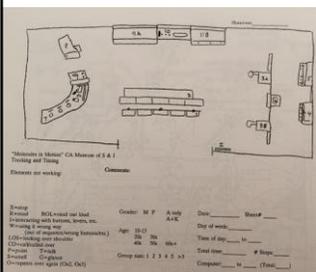


Data Collection Methods

- **Document Review**
Reviewing records you have on hand
- **Observations**
Unobtrusively watching how visitors use exhibits
- **Interviews**
Talking to visitors about their experience
- **Surveys**
Asking questions, usually on paper
- **Pilot Testing / Prototyping Ideas**
Creating a mock-up and getting visitor feedback

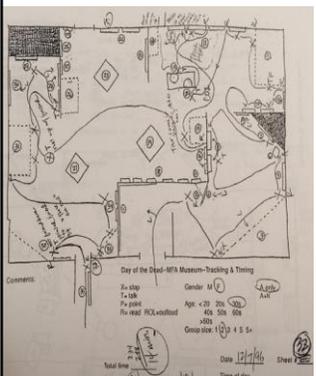


Observations



- Sketch a map of your gallery and identify discrete exhibit elements.
- Decide what behaviors you want to watch for.
- In a small gallery, or a large one with good sight lines, sit in a particular spot and record data from there. Otherwise, unobtrusively follow visitors.
- Other possibilities:
 - ✓ Security camera footage
 - ✓ Visitors self-tracking

Source: California Museum of Science & Technology, B. Serrell, *Paying Attention: Visitor & Museum Exhibitions*



- Track Visitors**
- Track visitor travel paths using lines and arrows.
 - Mark an X where they stop, with your code of behavior.
 - Collate into spreadsheet to determine how many stops are made at each exhibit, and how often behaviors are seen at them.
- With this data, think about:**
- Why numbers may be high or low (exhibit lost in a corner? upstaged somehow?)
 - Which exhibits are really engaging?
 - What qualities do you think make them that way?

Source: Mexican Fine Arts Museum, B. Serrell, *Paying Attention: Visitor & Museum Exhibitions*

Surveys



1. Define a clear, attainable goal for your survey
2. Keep more personal questions to the end
3. Don't let your survey get too long
4. Focus on using closed-end questions
5. Consider offering incentives
6. Don't ask leading questions
7. Keep answer choices balanced
8. Absolutes can hurt the quality of responses
9. Avoid "double-barrelled" questions
10. Preview your survey before you send it

Source: Best Practices from <https://www.surveymonkey.com/mp/survey-guidelines/>

**Spreadsheet # 2
Qualitative Data**

	A	B	C	D	E	F	G
1	Main purpose To show	specific					blend
2	learning		learning				diversity
3	the different kinds of geckos		1 variety				diversity
4	how well they blend in - very informative -						
5	sometimes couldn't find all in cage		1 blend				diversity
6	geckos and how they survive / fact [sic]						evolution
7	pertaining to the well being of geckos		1 survival				evolution
8	variety, how they mimic		1 variety	blend			habitat
9	the varieties of geckos		1 variety				learning
10	diversity of geckos and adaption						
11	mechanisms for survival		1 variety	adaptation			learning
12	kids the different types of geckos and what						learning
13	they do and how they find		1 variety				learning
14	the different types of geckos and their		1 variety	abilities			learning
15	abilities						
16	geckos survival techniques and the variety		1 survival	variety			learning
17	that exist		1 survival				learning
18	to demonstrate how geckos live and have to		1 survival				learning
19	adapt						
20	an example of the great diversity and						
21	adaptability of species - share recent						
22	research on geckos behavior and physical						
23	characteristics		1 variety	research			learning
24	to get a deeper understanding		learning				learning
25	the traits, diversity, special considerations						
26	of geckos. The application of the evolution						
27	of gecko toes to modern technology						
28	development		1 variety	evolution research			learning
29	help educate others		learning				learning

WRAP UP

Quick Recap

What We Have Covered Today:

- Importance of Connecting to Visitors
- Understanding Your Visitors
- Marketing Basics
- Visitor Studies Basics
- Evaluation Basics



Recommended AUD Resources

American Alliance of Museums (AAM), Marketing and Public Relations Resources <https://www.aam-us.org/programs/resource-library/marketing-and-public-relations-resources/>

Catlin-Legutko, Cinnamon & Klingler, Stacy, *Small Museum Toolkit*, Altamira Press, 2012.

Falk, John H., *Identity and the Museum Visitor Experience*, Left Coast Press, 2009.

Kotler Neil G., Philip Kotler, and Wendy Kotler, *Museum Marketing & Strategy: Designing Missions, Building Audiences, Generating Revenue & Resources*, 2nd ed., Jossey-Bass, 2008.

Serrell, Beverly, *Paying Attention: Visitor and Museum Exhibitions*, AAM, 1998.

Simon, Nina, *The Participatory Museum* (2010) <http://www.participatorymuseum.org/> and *The Art of Relevance* (2016) <http://www.artofrelevance.org/>

Texas Commission on the Arts, Overview and How-tos on Cultural Tourism and Market Research <http://www.arts.texas.gov/resources/tools-for-results/cultural-tourism/> and <http://www.arts.texas.gov/resources/tools-for-results/marketing/when-conducting-market-research/>

Visitor Studies Association <https://www.visitorstudies.org>

Kim C. Gardner Policy Institute , Demographic Data <https://gardner.utah.edu/demographics/>

San Luis Obispo Museum of Art Visitor Studies Manual <https://visitorstudiesmanual.wordpress.com/>



YOUR ASSIGNMENT

- 1) Complete the free, confidential **OF/BY/FOR ALL organizational self-assessment** (10 minutes) to help identify your strengths and weaknesses in being OF, BY, and FOR your community. They will send you a report. <https://www.ofbyforall.org/assess-now>
- 2) Develop your **Brand Statement Organizational Analysis** as first step to building a marketing plan by asking a **museum insider** (staffer not here today) and a **museum outsider** (visitor or friend) to complete questionnaire (*Hands-on Activity #2*).
- 3) Prepare to **report out on these both** in Month 4.
- 4) Based on your self-assessment, **work with your Mentor** to implement **at least one additional project** for this module.

Possible Projects for AUD

- Visitor guestbook. Log to track daily visitation totals, names & types of groups that visit, special event counts, etc., to identify trends.
- Survey questionnaire for general visitors and/or program participants.
- Experiment with new types of data collection about audience.
- Report detailing how the institution interacts with the community it serves.
- Communications audit.
- Media policy.
- Updated institutional logo, letterhead, and other materials.
- Institutional website or update of existing website.
- Marketing plan.
- Policy on customer service expectations for paid and unpaid staff.
- Review of interior signage, directional signage along roadways.
- Review of interior and exterior visitor amenities, noting ADA requirements.
- Review of interior and exterior lighting.
- Building and grounds maintenance and cleaning schedule.

Wrap-Up

- **StEPS-UT is a partnership** between the Utah Division of Arts & Museums, Utah Humanities, and Utah Division of State History, and is supported by funding from the Utah Department of Heritage & Arts, the State of Utah, and the National Endowment for the Humanities.
- Questions? Anything else? Nametags to the basket please.
- **Mentor & Mentee Break-out Groups until 5pm.**

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